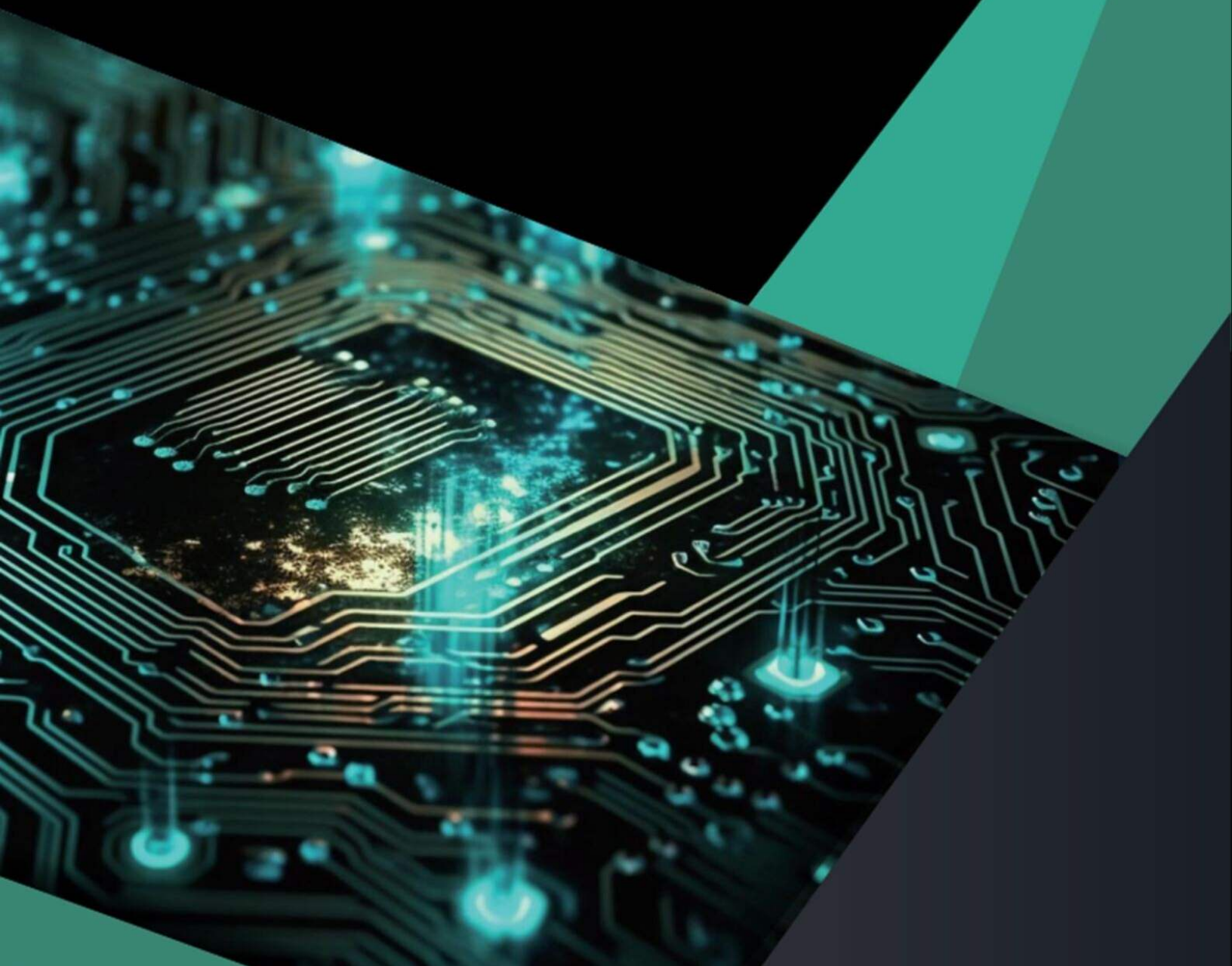
BRIOCEAN

August 2025

Monthly Market Updates

Your preferred supplier for global sourcing



About Briocean

Briocean was established in 2008 as ISO9001:2005, and ANSI/ESD S20.20-2021 certified leading independent electronic component distributor, with our headquarters in Singapore. Our company specialises in sourcing and supply chain management services for the electronic manufacturing clients across a broad range of industries.

Our global network of over 10,000 vetted suppliers allows us to respond to the unique needs of our clients, from reducing component shortages to achieving significant cost savings. Our robust supplier management system and two state-of-the-art quality assurance centres in Shenzhen and Hong Kong ensure that we deliver reliable, traceable procurement services.

At Briocean, quality is our cornerstone. Our commitment is to ensure that every component we source is of the highest quality.

Summary

Category	Trend
Macroeconomics	- U.S. Plans High Tariffs on Imported Semiconductors - U.S. Government Considers Equity for Subsidies - South Korea Launches 45.8 Trillion Won Support Plan to Strengthen Semiconductor Supply Chain - Fire at Japan's Kanto Denka Kogyo NF_3 Factory Causes Semiconductor Gas Supply Instability - China's Cyberspace Administration Urges Tech Companies to Accelerate Local AI Chip Substitution
Industry	Short-term - Cambricon/Hygon: Chinese Chip Concept Stocks Surge, Market Sentiment High - Samsung: HBM4 Verified by NVIDIA, Pre-production Planned for End of August - SK Hynix: Explosive Demand for HBM3E, Significant Revenue Contribution - Micron: Layoffs and Cost-Cutting Focused on HBM and High-Margin Memory - NVIDIA: Launch of Jetson AGX Thor Platform Mid-term - Renesas: Released RZ/G3E MPU and RA8P1 MCU for Industrial/Human-Machine Interface and High-Performance Control - DeepSeek: Released DeepSeek-V3.1, Supporting FP8 Precision - Microsoft: Windows 11 Update Causes SSD "Drive Drop" Issues - STMicroelectronics: Released Q2 Results and Reaffirmed Acquisition of NXP Sensor Business, MEMS Maintains Double-Digit Growth - NXP: Q2 Results Exceeded Expectations and Advancing Sensor Business Sales Long-term - Huawei: Achieving Full Industry Chain Localization of Kirin Chips - TSMC: Gradual Exit from 6-inch Production Lines within Two Years, Focus Resources on 12-inch and Advanced Packaging/Process - NVIDIA: Blackwell/Rubin Generational Transition and Compliance Variants in China, Reshaping AI Supply Chain Quotas

Category	Trend
End-market	- Artificial Intelligence: Intel Received a $2 Billion Investment From SoftBank to Enhance AI Chip and Foundry Manufacturing; Google will Invest an Additional $9 Billion in the U.S. to Expand Cloud Computing and AI Infrastructure; - New Energy: Sungrow Plans to Build a Hydrogen Electrolyzer Plant in Oman, Expanding its Footprint in the Middle Eastern Hydrogen Market; CCAG Plans to Build a Factory in Europe, Accelerating its Global Expansion - Consumer Electronics: Xiaomi Released its Q2 2025 Financial Report, with Global Smartphone Market Share Reaching 14.7%; AgiBot Received a Multi-million Yuan Order From Fulin Precision, Advancing Industrial Embodied AI Toward Large-scale Commercial Deployment - Industrial: Foxconn Industrial Internet Posted Record-high Performance in the First Half of 2025, With Net Profit Increasing by 38.6% - Automotive: Longhorn Auto Plans to Raise Up to ￥1.105 Billion Through a Private Placement to Expand Production Lines in Shenzhen and Huizhou - Communication: China Mobile Awarded an AI Inference Device Centralized Procurement Project Worth ￥5.112 Billion, With Companies Like ZTE Among the Winners - Medical Equipment & Devices: Mindray's Wuhan Base Officially Opened, With a Total Investment of ￥4.5 Billion
Component Pricing & Product Insights	- Memory Chips: In August, Memory Chip Prices Across the Board Increased, With Structural Adjustments on the Supply Side - GPU: Product Iteration Accelerates, AI GPU Leasing and Substitution Trends Are Significant - CPU: Server CPU Pressures Rise, Starting Price Wars; Consumer Market Shows Supply and Demand Divergence

Table Of Contents

01

Macro Environment Overview

1. Macro Environment Overview

1.1 Industry Policy

1.1.1 U.S. Plans High Tariffs on Imported Semiconductors

On August 15, U.S. President Trump announced plans to impose tariffs of up to 200% or even 300% on imported semiconductor chips, far exceeding the previously estimated 100%. The policy, framed as a national security measure, aims to force global chip manufacturers to relocate production to the U.S. and reduce dependence on foreign supply chains. However, this has led to significant volatility in global semiconductor stocks and ETFs, raising concerns about supply chain restructuring and rising costs. Trump clarified that an exemption mechanism would be established, promising tariff exemptions for companies investing in U.S. manufacturing. Apple, having already committed to an additional $10 billion investment, totaling $60 billion in domestic manufacturing, is seen as a potential beneficiary.

1.1.2 U.S. Government Considers Equity for Subsidiesa

U.S. Secretary of Commerce Gina Raimondo is studying a plan for the federal government to hold equity stakes in industry giants that receive subsidies under the CHIPS Act and commit to building chip factories in the U.S. This “equity for subsidies” move is designed to ensure that U.S. jobs and investments are not offshored. In addition to negotiating with Intel for a 10% stake, similar arrangements are being considered for Micron, TSMC, Samsung, and other major beneficiaries of subsidies. This model could help reduce direct financial spending pressure on the U.S. government while allowing it to participate in decision-making as a "shareholder" and benefit from the industry's growth.

1.1.3 South Korea Launches 45.8 Trillion Won Support Plan to Strengthen Semiconductor Supply Chain

On August 20, the South Korean government announced a 45.8 trillion-won ($234.95 billion) support plan aimed at enhancing supply chain resilience. The plan combines low-interest financing and public-private funds, with a focus on six key industries: batteries, semiconductors, critical minerals, energy, pharmaceuticals and biotechnology, and logistics infrastructure. The funding includes a 10 trillion-won supply chain stabilization fund, 13.3 trillion won from the Korea Export-Import Bank, 18 trillion won from the Korea Development Bank, and 4.5 trillion won from the Small and Medium Business Bank. Additionally, two joint investment funds will be established: a 1.8 trillion-won fund focused on leading companies and a 600 billion-won fund dedicated to supporting SMEs in materials, components, and equipment.

1.1.4 Fire at Japan's Kanto Denka Kogyo NF_3 Factory Causes Semiconductor Gas Supply Instability

On August 2025, a fire broke out at Kanto Denka Kogyo's nitrogen trifluoride (NF_3) plant in Japan, disrupting NF_3 production and raising concerns about global semiconductor gas supply chain stability. NF_3 is a key material in chip etching and tungsten hexafluoride production, and Kanto Denka Kogyo is one of the few major producers in this field. This incident could lead to production interruptions and delays in semiconductor manufacturing, affecting the overall chip-making process. Although leading manufacturers like TSMC are less affected due to their diversified supply chain strategies, the potential impact on the Japanese semiconductor industry is significant, particularly for new players like Rapidus, which relies on Kanto Denka Kogyo for around 90% of its NF_3 supply. This incident highlights the semiconductor industry's high dependency on critical raw materials, especially the vulnerability of gas supply chains. As demand for materials continues to rise, the diversification and security of supply chains will be crucial for the industry's future development.

1.1.5 China's Cyberspace Administration Urges Tech Companies to Accelerate Local AI Chip Substitution

On July 31, China's Cyberspace Administration held talks with Nvidia, questioning the security risks of its H20 chip, which allegedly has “remote shutdown and tracking backdoors,” and urged Chinese tech companies to be cautious when purchasing it. CCTV subsequently labeled the H20 chip as "unsafe, outdated, and environmentally harmful." This move has accelerated the substitution of Chinese-made AI chips, with giants like Tencent, Alibaba, and Baidu announcing plans to reduce their reliance on Nvidia chips and transition to Chinese solutions like Huawei’s Ascend and Cambricon. By 2024, the localization rate of AI chips in China is expected to rise to 30%, with shipments reaching 820,000 units (doubling from 2023). It is forecasted that by 2027, the share of Chinese-made AI chips will reach 55%.

1.2 Economic Indicators

1.2.1 Global Manufacturing PMI Continues to Decline to 49.7, Weak Global Demand Affects Semiconductor Output

In July 2025, the global Manufacturing PMI recorded 49.7, a decline from June's 50.3, once again falling below the critical 50 threshold, indicating a slight deterioration in global manufacturing activity and further softening of market demand. This data reflects ongoing economic pressure worldwide, particularly in manufacturing, where output, new orders, exports, and employment have all shown a downward trend, potentially impacting semiconductor demand.

Regional Differences Are Notable: In the Asian market, China’s PMI stood at 49.3, and South Korea’s PMI was 48, both reflecting continued contraction, with significant pressure in electronic manufacturing bases regarding production and orders. Japan's PMI was 49.9, slightly lower than June but still near 50, indicating a slight rebound in Japanese manufacturing. India continued to perform strongly, with a PMI of 59.2, maintaining a high growth rate, showing a robust momentum contrasting with other regions. For the U.S. and Eurozone markets, the U.S. PMI was 48, and the Eurozone PMI was 49.8, both showing a decline from the previous month, reflecting economic slowdown pressures.

This regional disparity presents a complex outlook for semiconductor demand: The rebound in India and the Eurozone could potentially drive growth in memory, storage, and some general-purpose chips, while the continued contraction in major markets like China and South Korea might signal downward pressure on demand for consumer electronics and smart devices. For semiconductor manufacturers, it is essential to focus more on regional market dynamics, especially targeting high-growth markets like India and the moderate recovery in Europe and the U.S., while cautiously addressing the downside risks in the Asian market and adopting more flexible strategies.

Global Manufacturing PMI by Region

Period	Global	China	Japan	Korea	India	Americas	Eurozone
2023-11	49.30	49.40	48.30	50.00	56.00	46.70	44.20
2023-12	49.00	49.00	47.90	49.90	54.90	47.40	44.40
2024-01	50.00	49.20	48.00	51.20	56.50	49.10	46.60
2024-02	50.30	49.10	47.20	50.70	56.90	47.80	46.50
2024-03	50.60	50.80	48.20	49.80	59.10	50.30	46.10
2024-04	50.30	50.40	49.60	49.40	58.80	49.20	45.70
2024-05	50.90	49.50	50.40	51.60	57.50	48.70	47.30
2024-06	49.50	49.50	50.00	52.00	58.30	51.70	45.60
2024-07	49.80	49.40	49.10	51.40	58.10	46.80	45.80
2024-08	48.90	49.10	49.80	51.90	57.50	47.20	45.60
2024-09	48.80	49.80	49.70	48.30	56.50	47.20	45.00
2024-10	48.80	50.10	49.80	48.30	57.50	46.50	46.00
2024-11	50.00	50.30	49.00	50.60	56.50	48.40	45.20
2024-12	49.60	50.10	49.60	49.00	56.40	49.20	45.10
2025-1	50.10	49.10	48.70	50.30	57.70	50.90	46.60
2025-2	50.60	50.20	49.00	49.90	56.30	50.30	47.60
2025-3	50.30	50.50	48.40	49.10	58.10	49.00	48.60
2025-4	49.80	49.00	48.70	47.50	58.20	48.70	49.00
2025-5	49.60	49.50	49.40	47.70	57.60	48.50	49.50
2025-6	50.30	49.70	50.10	48.70	58.40	49.00	50.50
2025-7	49.70	49.30	49.90	48.00	59.20	48.00	49.80

Source : Wind

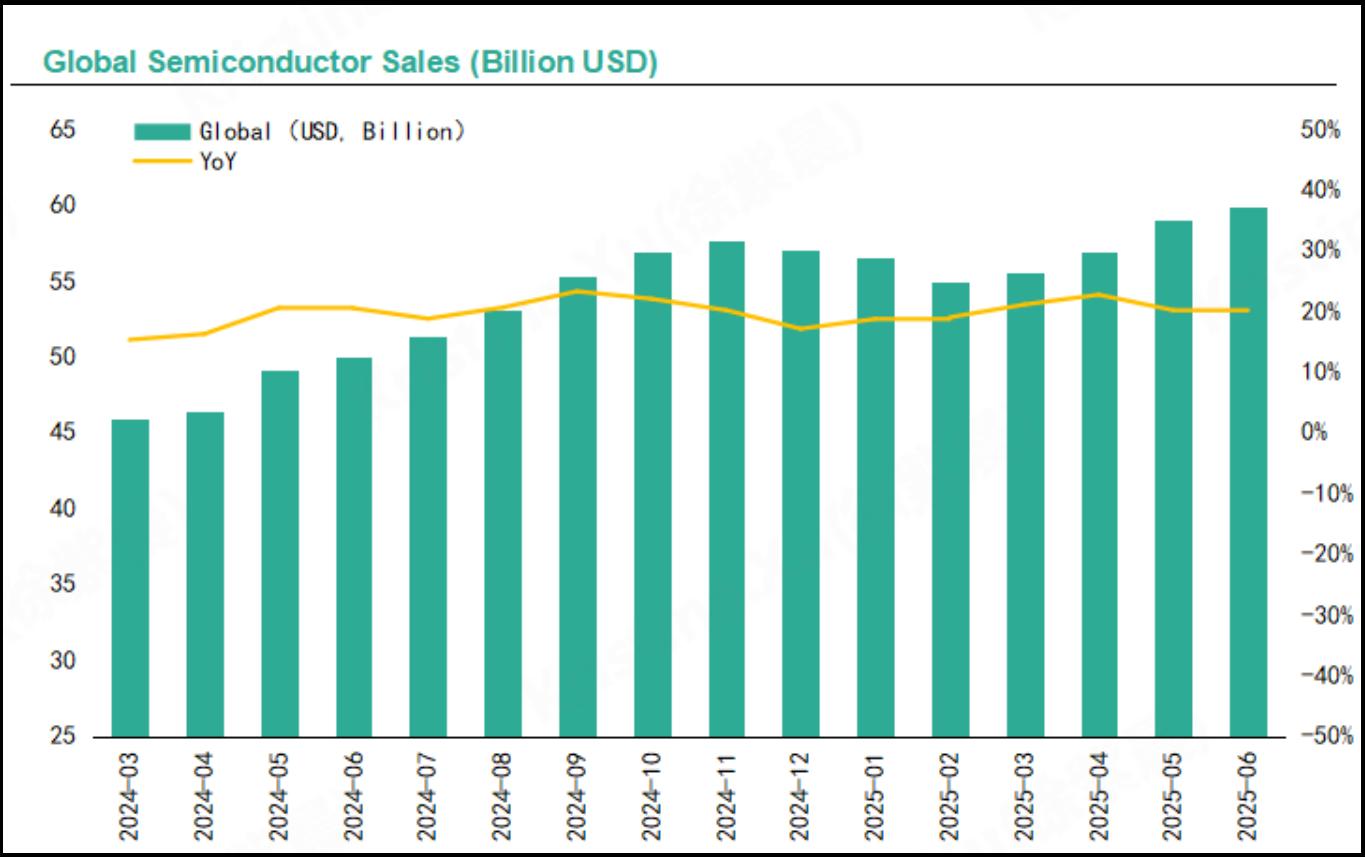
1.2.2 June Global Semiconductor Sales Hit Record High, Strong Performance in Asia-Pacific

In June 2025, global semiconductor sales reached a record $59.9 billion, a 19.6% year-over-year increase and a 1.5% month-over-month growth. This growth was mainly driven by the strong performance in the Asia-Pacific region, particularly the steady growth in the Chinese market. While the Americas and Europe also saw growth, the increases were relatively smaller. Specifically, sales in the Asia-Pacific and other regions grew by 34.2% year-over-year, with China's market increasing by 13.1%, while the Americas and Europe grew by 24.1% and 5.3%, respectively. However, the Japanese market experienced a 2.9% year-over-year decline, indicating relative weakness in the region's semiconductor market.

The month-over-month data also reflects a positive trend, with sales in the Asia-Pacific and other regions increasing by 5.8%, while China saw a 0.8% increase. The Americas and Europe markets, however, declined by 0.2% and 0.7%, respectively. These figures indicate that, despite regional differences, the overall semiconductor market is showing sustained growth.

It is important to note that, despite the significant global sales growth, Japan's market performance was relatively weak, potentially due to domestic demand softness and uncertainties in international trade. Moving forward, global semiconductor market growth may be affected by geopolitical and trade policy changes, particularly with ongoing trade tensions between the U.S. and China.

Overall, the June 2025 sales data reflects strong growth in the global semiconductor market, particularly in the Asia-Pacific region. With continued demand from sectors like artificial intelligence, data centers, and high-performance computing, the global semiconductor market is expected to maintain its growth momentum in the second half of the year.



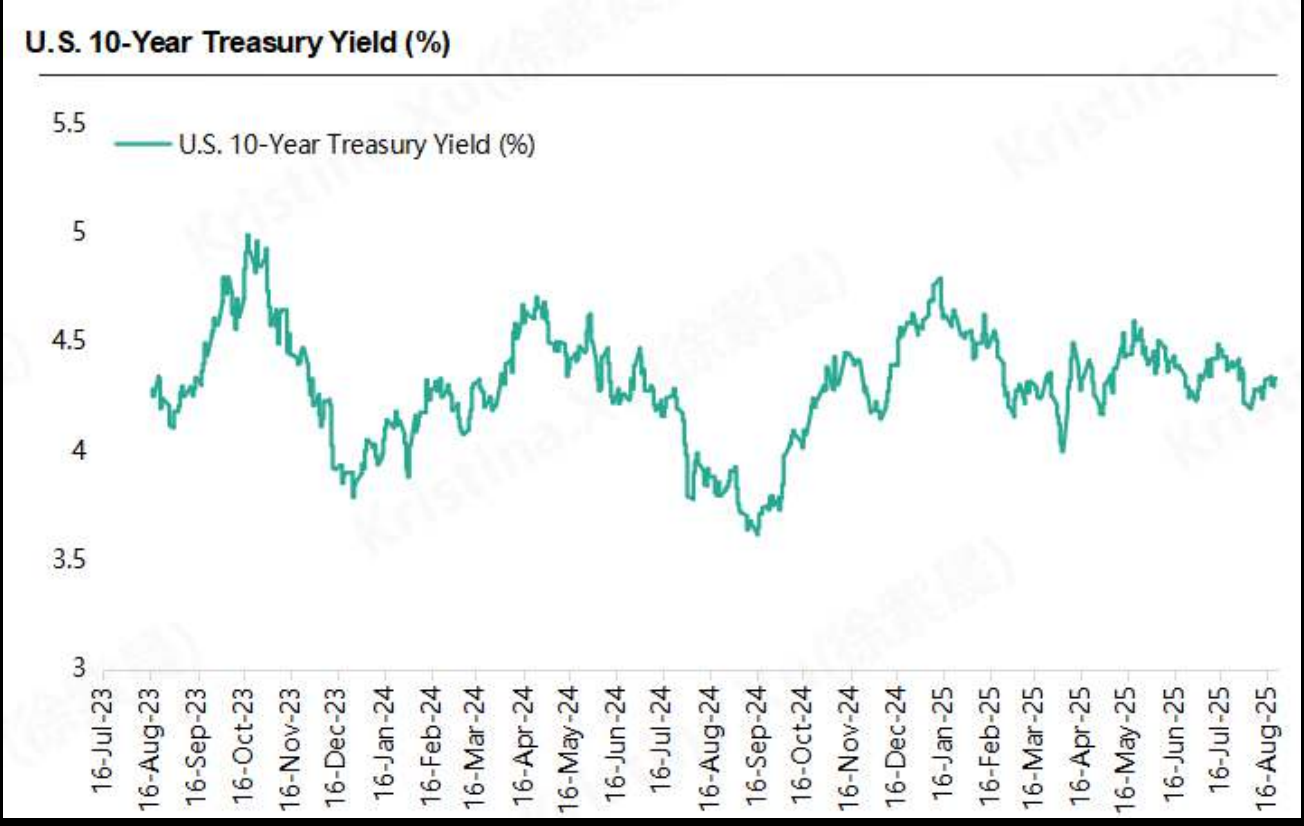
Source：SIA

1.2.3 U.S. 10-Year Treasury Yield: Volatility in July-August, Diverging Market Expectations

From July to August 2025, the U.S. 10-year Treasury yield continued to fluctuate at elevated levels, reflecting the market's intense focus on the future trajectory of monetary policy. On July 22, the yield briefly rose to 4.392%, before retreating to 4.328% by July 29, and then rebounding to 4.293% in early August. As of August 22, the yield stabilized around 4.334%. This volatility range is significantly higher than the 3.8% at the beginning of 2024 and 3.7% mid-year, though still below the near 5% peak at the end of 2023.

Market expectations for the Federal Reserve's future policy have become divided. Despite weak employment data in July and August, which have strengthened the case for rate cuts, the rise in the Producer Price Index (PPI) in July has increased inflationary pressure, raising doubts about the likelihood of rate cuts. Currently, the market sees an 82% probability of a 25-basis point rate cut in September. However, Fed Chairman Jerome Powell emphasized that, considering persistent inflation and a strong labor market, the likelihood of a rate cut remains limited. Additionally, political pressures and the expanding fiscal deficit may also influence the Fed's policy decisions.

For the semiconductor industry, high yields could lead to increased financing costs, affecting capital expenditures and investment decisions. Therefore, companies must closely monitor macroeconomic and policy dynamics, and adjust strategies flexibly to respond to potential market changes.



Source : Investing

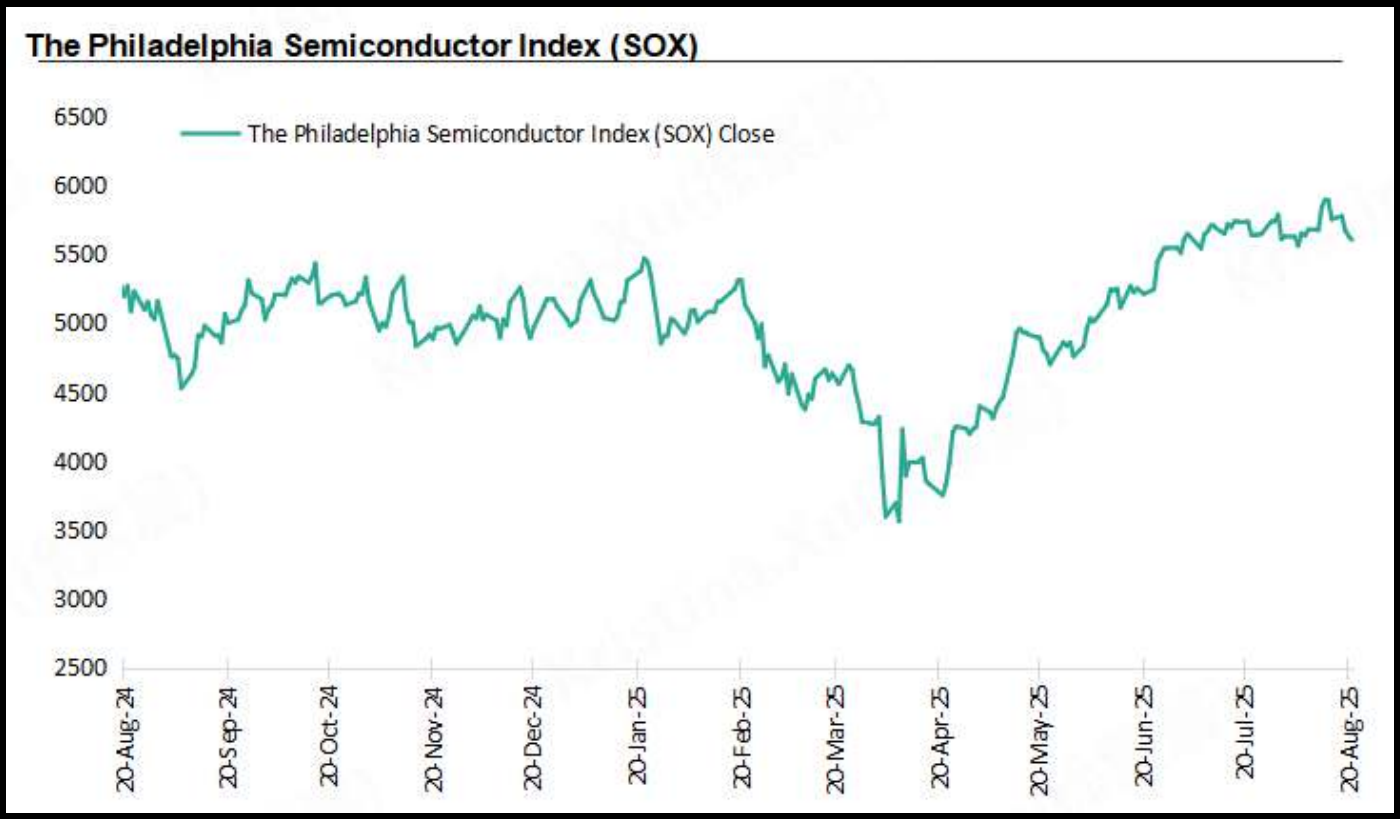
1.2.4 Philadelphia Semiconductor Index (SOX) Performance Analysis for July-August: High Volatility and Market Confidence Test

From July to August 2025, the Philadelphia Semiconductor Index (SOX), after experiencing strong growth in the first half of the year, entered a phase of adjustment. On July 31, the index closed at 5,607.92 points, slightly down from the June-end value of 5,730.42 points. In August, the index continued to fluctuate, closing at 5,603.26 points on August 21, a slight decline from the end of July.

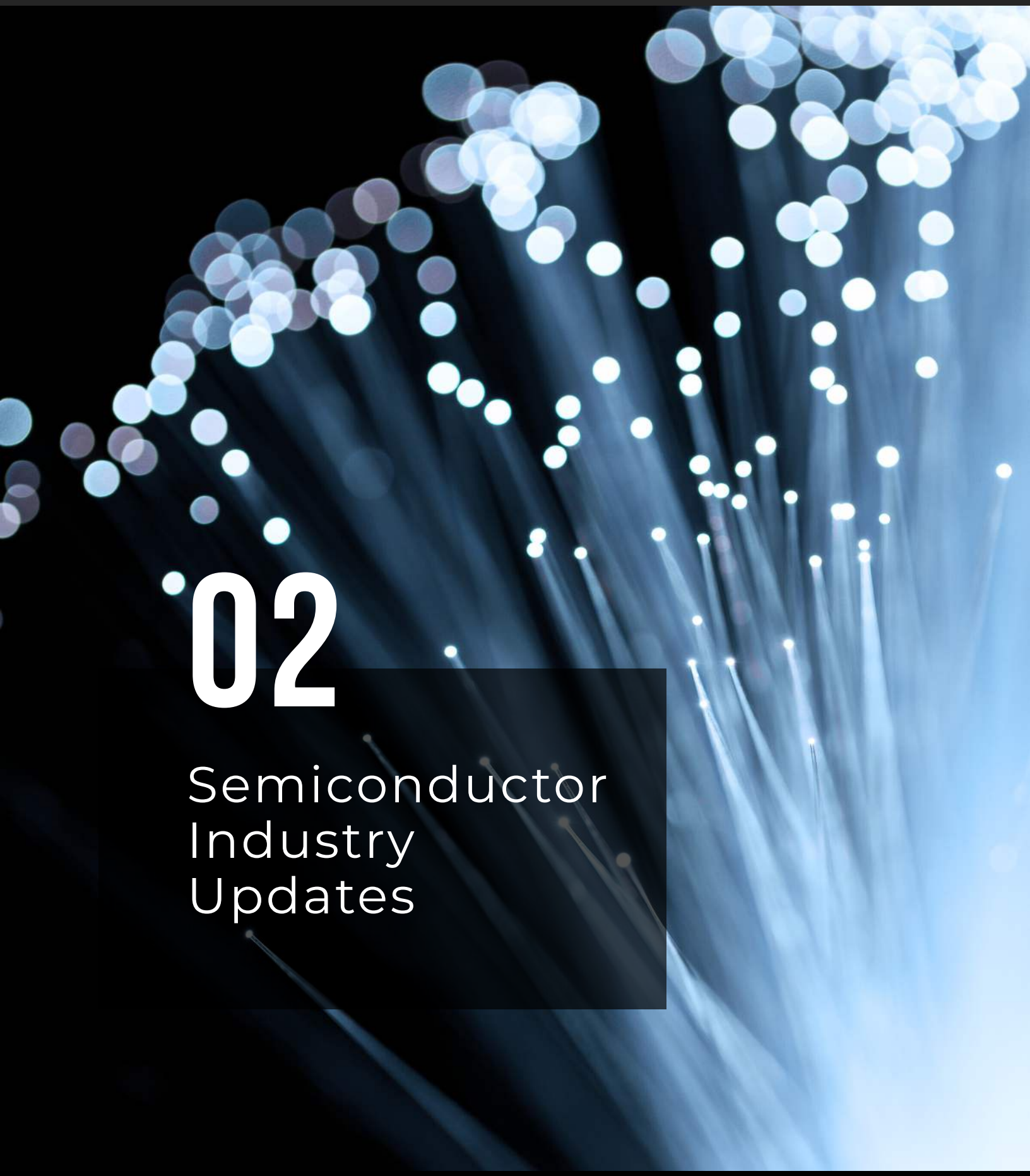
This adjustment may be attributed to multiple factors. First, concerns over high valuations have intensified, particularly in the context of overvalued AI-related stocks. Second, weak macroeconomic data, such as slower employment growth and an increase in unemployment claims, could raise fears of an economic slowdown. Additionally, expectations regarding the Federal Reserve's monetary policy may also be influencing investor sentiment.

Despite this, the fundamentals of the semiconductor industry remain strong. The global demand for high-performance chips continues to grow, particularly in AI, cloud computing, and automotive electronics. Therefore, while the market may face short-term pressure, the semiconductor industry still holds strong long-term growth prospects.

Investors should monitor macroeconomic data and changes in the Federal Reserve's monetary policy to assess market trends. At the same time, it is advisable to pay attention to the fundamental changes in the semiconductor industry to identify long-term investment opportunities.



Source : MacroMicro



02

Semiconductor Industry Updates

Semiconductor Industry Updates

Impact	Manufacturer	Updates	Analysis
Short-term	Cambricon Hygon	Chinese Chip Concept Stocks Surge, Market Sentiment High	Stocks of Chinese chip companies such as Cambricon and Hygon Information have seen significant increases, reflecting the market's optimistic outlook on the future of Chinese computing power
Short-term	Samsung	HBM4 Verified by NVIDIA, Pre-production Planned for End of August	A technological breakthrough has earned recognition from key clients, boosting market confidence and laying the foundation for capturing the AI memory market
Short-term	SK Hynix	Explosive Demand for HBM3E, Significant Revenue Contribution	The continued demand for AI servers is driving high-end storage revenue, with the company's performance reaching new highs
Short-term	Micron	Layoffs and Cost-Cutting Focused on HBM and High-Margin Memory	Micron, through layoffs and cost optimization, is reallocating resources to support the production of HBM and high-end DRAM products, which will help improve operational leverage and enhance delivery capacity in the short term
Short-term	NVIDIA	NVIDIA Launch of Jetson AGX Thor Platform	The new platform provides high-performance support for robotics and edge AI applications, expanding its application areas

Impact	Manufacturer	Updates	Analysis
Mid-term	Renesas	Released RZ/G3E MPU and RA8P1 MCU for Industrial/Human-Machine Interface and High-Performance Control	Platform update strengthens ecosystem lock-in (RTOS/middleware/security), with plans to expand industrial and home appliance market share in the medium term
Mid-term	Deepseek	Released DeepSeek-V3.1, Supporting FP8 Precision	FP8 precision adaptation for the next generation of Chinese-made chips, reducing memory usage and computational costs, driving the implementation of the AI model-chip ecosystem in China
Mid-term	Microsoft	Windows 11 Update Causes SSD "Drive Drop" Issues	Impacts consumer SSD market confidence, increasing short-term market hesitation, but has limited effect on the enterprise storage market
Mid-term	STMicroelectronics	Released Q2 Results and Reaffirmed Acquisition of NXP Sensor Business, MEMS Maintains Double-Digit Growth	Q2 revenue slightly exceeded expectations, with a decline in analog products, but MEMS achieved double-digit growth. The company acquired NXP's automotive motion and pressure sensor business for $950 million to strengthen competitiveness in automotive safety and industrial sensors. In the medium term, this is expected to improve AMS segment utilization and gross margin flexibility
Mid-term	NXP	Q2 Results Exceeded Expectations and Advancing Sensor Business Sales	NXP is selling part of its sensor business to focus on automotive networks and power management, which will further enhance its capital returns and market position

Impact	Manufacturer	Updates	Analysis
Long-term	Huawei	Achieving Full Industry Chain Localization of Kirin Chips	The localisation of Huawei's Kirin chips marks a significant breakthrough in China's semiconductor industry's self-reliance, which will ultimately reshape the global semiconductor supply chain
Long-term	TSMC	Gradual Exit from 6-inch Production Lines within Two Years, Focus Resources on 12-inch and Advanced Packaging/Process	Shifting production capacity and capital towards high-value-added processes will improve long-term ROIC and strengthen the technological moat
Long-term	NVIDIA	Blackwell/Rubin Generational Transition and Compliance Variants in China, Reshaping AI Supply Chain Quotas	Coordinated upgrades in ecosystems, software, networking, and memory will sustain platform advantages in the long term, but will lead to deeper reliance on HBM capacity

2. Semiconductor Industry Updates

2.1 Short-term Implications

2.1.1 Cambricon/Hygon: Chinese Chip Concept Stocks Surge, Market Sentiment High

On August 22, 2025, Chinese A-share market stocks related to the concept of Chinese chips opened significantly higher, with companies like Cambricon and Hygon Information seeing notable gains. In the short term, this rally reflects widespread optimism in the market about the development prospects of China's computing power. In the medium term, this market sentiment is backed by substantial progress such as the active adaptation of Chinese AI models (e.g., DeepSeek-V3.1) to Chinese chips, and Huawei's Ascend chips actively participating in industry tenders, which builds industry confidence. In the long term, recognition from the capital markets acts as a booster for industry development, providing a better financing environment for Chinese semiconductor companies, accelerating technological R&D and ecosystem development, and further solidifying the long-term trend of substitution by Chinese alternatives.

2.1.2 Samsung: HBM4 Verified by NVIDIA, Pre-production Planned for End of August

Samsung Electronics' HBM4 product has successfully passed Nvidia's verification and is planned to enter the pre-production phase by the end of August. In the short term, this has greatly boosted market confidence in Samsung's ability to catch up in the AI memory field. In the medium term, successfully entering Nvidia's supply chain means Samsung will capture a share of the future AI accelerator market. With its overall semiconductor manufacturing advantages, Samsung is poised to shift the current market landscape dominated by SK Hynix in the HBM4 era, with expectations to capture approximately 30% of the market share. In the long term, as HBM is a core component for AI computing power, this breakthrough gives Samsung significant leverage in the upcoming AI hardware competition.

2.1.3 SK Hynix: Explosive Demand for HBM3E, Significant Revenue Contribution

SK Hynix reported record revenue and operating profit in the second quarter of fiscal year 2025, driven primarily by increased sales of memory products for artificial intelligence (AI), particularly HBM3E. In the short term, its close cooperation with a "single major customer" (widely believed to be Nvidia) is the core driver of its performance. In the medium term, SK Hynix has successfully captured a large share of the DRAM market, thanks to the strong performance of its HBM products. In the long term, deep ties with AI chip giants have not only brought stable orders but also positioned SK Hynix in a favorable spot within the AI wave, allowing the company to continue enjoying the dividends brought by AI development.

2.1.4 Micron: Layoffs and Cost-Cutting Focused on HBM and High-Margin Memory

Micron announced a layoff plan and cost optimization in August 2025. This strategic shift aims to focus resources on the production of high-margin memory products such as HBM3E/HBM4. In the short term, this move will help improve the company’s operational leverage, enhance supply chain efficiency, and ensure it can meet the growing demand for AI memory. By focusing on high-end memory R&D and production, Micron expects to maintain its gross margin while reducing the drag from low-margin products on its overall financial performance.

2.1.5 NVIDIA: Launch of Jetson AGX Thor Platform

Nvidia's launch of the Jetson AGX Thor platform provides unprecedented computing power (2070 FP4 TFLOPS) for robotics and physical AI applications, marking an important move into edge computing and AI. In the short term, this platform will significantly enhance the capabilities of AI developers, especially as the demand for edge devices and low-latency computing continues to rise. With its high efficiency and flexibility, Jetson AGX Thor will accelerate machine learning and physical AI tasks, especially in fields like autonomous driving and industrial robotics, meeting the urgent demand for high-performance AI computing solutions. Additionally, the launch will drive more developers to adopt Nvidia's hardware in the short term, further solidifying its leadership position in the AI hardware market. Nvidia’s move not only provides strong technical support for edge computing and physical AI applications but is also expected to promote the broader application and rapid growth of these emerging fields in the short term.

2.2 Mid-term Implications

2.2.1 Renesas: Released RZ/G3E MPU and RA8P1 MCU for Industrial/Human-Machine Interface and High-Performance Control

In July and August 2025, Renesas released continuous updates to its embedded platforms (RZ/G3E and RA8P1), addressing the needs of industrial control, human-machine interfaces, and high-performance control. In the medium term, these updates strengthen the ecosystem (toolchain/RTOS/security/middleware), helping to expand market share in industries such as industrial, home appliances, and buildings. In the long term, the company will benefit from its platform-based and long-term supply strategies.

2.2.2 DeepSeek: Released DeepSeek-V3.1, Supporting FP8 Precision

In August 2025, DeepSeek released the next-generation large model DeepSeek-V3.1, incorporating the FP8 floating-point precision scheme in its adaptation for Chinese chips. In the short term, the FP8 format reduces memory usage to 25% of FP16, directly lowering deployment and operating costs for AI applications. In the medium term, this marks a key step in the proactive adaptation of Chinese AI software to Chinese hardware, providing clear technical paths and ecosystem support for domestic GPU manufacturers like Moore Threads, significantly shortening the deployment cycle for Chinese computing power platforms. In the long term, this effort aims to establish a "Chinese model-Chinese chip-Chinese system" technological loop, which is a crucial strategic move to achieve autonomous and controllable AI computing power. Industry estimates suggest that adopting the FP8 solution could reduce data center costs by approximately 40%.

2.2.3 Microsoft: Windows 11 Update Causes SSD "Drive Drop" Issues

In August 2025, Microsoft’s Windows 11 update triggered an issue of some SSDs "dropping disks," causing concerns among consumers about the operating system update. This may intensify market hesitation and impact demand and confidence in the consumer SSD market in the short term. However, the enterprise storage market was less affected, as its systems are designed for high stability and compatibility, which are less susceptible to such issues. Microsoft is expected to release a patch to fix the issue, restore user trust, and rebuild confidence in the consumer market.

2.2.4 STMicroelectronics: Released Q2 Results and Reaffirmed Acquisition of NXP Sensor Business, MEMS Maintains Double-Digit Growth

STMicroelectronics reported Q2 revenue of $2.77 billion, slightly above the midpoint of the forecast. Power and RF segments were under pressure, but MEMS achieved double-digit growth. The management emphasized the $900 million plus $50 million incentive acquisition of NXP's automotive motion and pressure sensor business, which will be integrated into the AMS (Analog, MEMS, and Sensors) segment, targeting high-growth sectors such as airbags, vehicle dynamics, tire pressure monitoring, and industrial pressure/accelerometers. The deal is expected to close in the first half of 2026 and will likely enhance sensor gross margins and scale synergies in the medium term while complementing ST's sensor matrix for ADAS, cabin, and in-vehicle monitoring.

2.2.5 NXP: Q2 Results Exceeded Expectations and Advancing Sensor Business Sales

NXP reported Q2 revenue of approximately $2.93 billion, a 6% year-over-year decline, but slightly above Wall Street expectations. Non-GAAP earnings per share were $2.72, slightly ahead of the forecast midpoint. Meanwhile, the company announced the full cash sale of its MEMS sensor business to STMicroelectronics for up to $950 million. This business generated approximately $300 million in revenue in 2024 and operates with a high-profit margin. The deal includes a $900 million upfront payment and $50 million in milestone payments, expected to close in the first half of 2026. This asset divestiture is intended to optimize capital allocation and increase operational focus. In the medium term, it will not only release cash flow to improve the balance sheet but also allow NXP to focus resources on core high-growth businesses, including automotive SoCs, in-vehicle networking, and power management platforms, thus enhancing capital return rates and strategic moats.

2.3 Long-term Implications

2.3.1 Huawei: Achieving Full Industry Chain Localization of Kirin Chips

Huawei has successfully achieved full domestic production of its Kirin chips, marking a significant breakthrough for China's semiconductor industry in the face of external pressures. With Kirin chips now entirely relying on domestic technology for production, Huawei has made significant progress in self-sufficiency and is expected to further solidify its market position in China's smartphone and AI sectors in the coming years. This shift will have profound implications for the independence of China's semiconductor industry and global supply chain dynamics, especially as China's role in the global tech industry continues to grow.

2.3.2 TSMC: Gradual Exit from 6-inch Production Lines within Two Years, Focus Resources on 12-inch and Advanced Packaging/Process

TSMC recently announced plans to gradually exit its remaining 6-inch wafer fabrication line over the next two years while continuing to integrate its four 8-inch production lines. The aim is to improve overall operational efficiency and reduce unit costs for mature processes. Meanwhile, the company continues to maintain strong output in its 12-inch advanced processes (such as N3/N4/N2) and CoWoS packaging business to meet the needs of high-end customers like Apple and Nvidia, ensuring its financial and technical targets remain unaffected. This move reflects TSMC's strategic optimization of its capacity structure: in the long term, capital and production resources are migrating toward high-value-added areas, which will reinforce its technological moat and significantly improve capital return rates.

2.3.3 NVIDIA: Blackwell/Rubin Generational Transition and Compliance Variants in China, Reshaping AI Supply Chain Quotas

Nvidia is advancing the next-generation GPU architecture transition from Blackwell to Rubin. The Rubin GPU will adopt TSMC's 3nm process, support HBM4 memory, and is expected to enter mass production in 2026, with performance multiple times greater than Blackwell. At the same time, the company is reshaping its strategy for the Chinese market: launching compliant AI chips (including the follow-up to H20 and B30A and RTX 6000D based on Blackwell) to adapt to the evolving export policies and regulatory environment. Nvidia is working to maintain its platform advantage in ecosystem, software, networking, and memory collaboration. This strategy will further strengthen its platform barriers in the long term, while also indicating a deeper reliance on HBM memory—because the performance of future high-end AI chips will still primarily depend on HBM technology.

03

Application Updates

3. Application Updates Overview

Category	Section	Manufacturer	Updates
Artificial Intelligence	AI Chip	Intel	Intel received a $2 billion investment from SoftBank to enhance AI chip and foundry manufacturing
Artificial Intelligence	Cloud Computing & Big Data	Google	Google will invest an additional $9 billion in the U.S. to expand cloud computing and AI infrastructure;
New Energy	Photovoltaics & Energy Storage	SUNGROW	Sungrow plans to build a hydrogen electrolyzer plant in Oman, expanding its footprint in the Middle Eastern hydrogen market
New Energy	New Energy Vehicles	CCAG	CCAG plans to build a factory in Europe, accelerating its global expansion
Consumer Electronics	Smartphones	XIAOMI	Xiaomi released its Q2 2025 financial report, with global smartphone market share reaching 14.7%
Consumer Electronics	Robotics	AgiBot	AgiBot received a multi-million yuan order from Fulin Precision, advancing industrial embodied AI toward large-scale commercial deployment;
Industrial	Industrial Automation & Control	Foxconn Industrial Internet	Foxconn Industrial Internet posted record-high performance in the first half of 2025, with net profit increasing by 38.6%
Automotive	Automotive Supply Chain	Longhorn Auto	Longhorn Auto plans to raise up to ¥1.105 billion through a private placement to expand production lines in Shenzhen and Huizhou

Category	Section	Manufacturer	Updates
Telecommunications	Communication Networks & Optical Fiber	China Mobile	China Mobile awarded an AI inference device centralized procurement project worth ￥5.112 billion , with companies like ZTE among the winners
Medical Equipment & Devices	Medical Imaging Equipment	Mindray	Mindray's Wuhan base officially opened, with a total investment of ￥4.5 billion

3.1 Artificial Intelligence

3.1.1 Intel Received a $2 Billion Investment From SoftBank to Enhance AI Chip and Foundry Manufacturing

On August 19, SoftBank Group signed a final agreement with Intel to purchase Intel's common stock at a price of $23 per share, for a total of $2 billion. Upon completion of the transaction, SoftBank will become Intel's fifth-largest shareholder, holding approximately 2% of the company. Intel stated that the funds will be used to support its efforts in contract manufacturing in the U.S., AI chip development, and digital transformation plans.

3.1.2 Google will Invest an Additional $9 Billion in the U.S. to Expand Cloud Computing and AI Infrastructure

On August 14, Google CEO Sundar Pichai announced that over the next two years, the company will invest $9 billion in Oklahoma, USA, to expand its cloud computing and AI infrastructure. This will include the construction of a new data center campus in Stillwater to enhance local computing power. Part of this investment is included in the previously announced 2025 capital expenditure plan, with the remainder coming from future projects. Additionally, Google will partner with local universities to launch AI skills training, aimed at boosting related employment opportunities.

3.2 New Energy

3.2.1 Sungrow Plans to Build a Hydrogen Electrolyzer Plant in Oman, Expanding its Footprint in the Middle Eastern Hydrogen Market

On August 6, Sungrow Power Supply Co., Ltd. announced the signing of a memorandum of understanding with Oman to build a hydrogen electrolyzer factory in the country to support Oman's green energy development. It is reported that Sungrow Power previously secured the contract to supply electrolyzers for Oman's 320MW green ammonia project, becoming the largest supplier for the water electrolysis hydrogen production system in the project. This move will further deepen its involvement in the Middle East hydrogen energy market and meet the region's green hydrogen demand.

3.2.2 CCAG Plans to Build a Factory in Europe, Accelerating its Global Expansion

According to Reuters, Changan Automobile recently announced plans to establish a factory in Europe to support its future sales in the European market. Changan has already made strides in expanding its European market presence: in March this year, the company announced plans to introduce electric vehicles to 10 European markets and held a European brand launch event in Germany. Its Deep Blue S07 began sales in the UK this year, with deliveries set to start in September. Changan has planned 20 overseas factories globally, with operations already underway in Egypt, Brazil, and other regions. The new European factory plan will further push its transition from product exports to localized production.

3.3 Consumer Electronics

3.3.1 Xiaomi Released its Q2 2025 Financial Report, with Global Smartphone Market Share Reaching 14.7%

On August 19, Xiaomi Group released its Q2 2025 financial report, stating that the global market share of its smartphones reached 14.7%, maintaining its position in the global top three for 20 consecutive quarters. The report noted a 38% year-on-year increase in shipments for smartphones in the ￥4000–6000 price range, which helped improve the smartphone business' gross margin to 22.6%, highlighting the success of its high-end strategy. Based on this strong performance, Xiaomi raised its 2025 full-year smartphone shipment target from 160 million to 175 million units.

3.3.2 AgiBot Received a Multi-million Yuan Order From Fulin Precision, Advancing Industrial Embodied AI Toward Large-scale Commercial Deployment

On August 11, AgiBot reached a multi-million yuan project collaboration with Fulin Precision Co., Ltd., with nearly 100 Expedition A2-W robots set to be deployed at Fulin Precision’s factory. This marks the first large-scale commercial order for industrial embodied robots in China and the first large-scale deployment of this category in global smart manufacturing scenarios, signaling the official transition of industrial embodied intelligence from the technology validation stage to large-scale commercialization.

3.4 Industrial

3.4.1 Foxconn Industrial Internet Posted Record-high Performance in the First Half of 2025, With Net Profit Increasing by 38.6%

On August 10, Industrial Fulian released its 2025 mid-year report, achieving record-high performance for the period: revenue of ￥360.76 billion, up 35.6% year-on-year; net profit attributable to the parent company of 12.11 billion yuan, up 38.6%. In the second quarter alone, revenue exceeded ￥200 billion for the first time, with net profit reaching ￥6.88 billion, both marking year-on-year growth and setting new records. The growth in performance was primarily driven by AI-related business, with significant growth in AI server revenue within the cloud computing segment, up over 60% year-on-year.

3.5 Automotive

3.5.1 Longhorn Auto Plans to Raise Up to ￥1.105 Billion Through a Private Placement to Expand Production Lines in Shenzhen and Huizhou

On the evening of August 5, Haon Automotive Electronics disclosed a private placement proposal, aiming to raise up to ￥1.105 billion to expand production lines at its Shenzhen and Huizhou bases and upgrade its R&D center. The funds will be used to enhance the production capacity of automotive intelligent driving perception systems and domain controllers. As a supplier of intelligent driving perception systems, Haon Automotive Electronics' products are already integrated into the supply chains of mainstream automakers such as SAIC Volkswagen, FAW-Volkswagen, BYD, XPeng, and Li Auto. This expansion will increase its production capacity by 3 to 4 times.

3.6 Communication

3.6.1 China Mobile Awarded an AI Inference Device Centralized Procurement Project Worth ￥5.112 Billion, With Companies Like ZTE Among the Winners

On August 18, China Mobile announced the candidate winners for its 2025-2026 AI general-purpose computing devices (inference type) centralized procurement project. H3C, ZTE, and Inspur were selected as candidates, with the total value of the three bid packages amounting to approximately ￥1.731 billion (including tax). Combined with the two previously announced bid packages, the total value of the project is about ￥5.112 billion (including tax), making it the largest AI server procurement order so far in 2025.

3.7 Medical Equipment & Devices

3.7.1 Mindray's Wuhan Base Officially Opened, With a Total Investment of ￥4.5 Billion

On August 5, Mindray Medical officially opened its second global headquarters in Wuhan, with a total investment of ￥4.5 billion. The new facility will help Wuhan develop into a cluster for the biopharmaceutical and medical device industries. The base plans to employ 2,000 people within five years, with 60% in R&D positions, and is expected to attract over 100 supporting companies, contributing to Wuhan's goal of exceeding an 800-billion-yuan health industry scale by 2030.

04

Product Updates

4. Product Updates

4.1 Memory Chips

Storage Chip Market Key Movements (Aug 2025)

Product Category	Model	Price Trend	Lead Time (Weeks)	Supply-Demand Status
DDR4	8GB	Rising	Not specified	Some Constraints
DDR5	16GB	Rising	Not specified	In Equilibrium
NAND Flash	128GB	Rising	6-10	Some Constraints
eMMC	32GB	Rising	8-12	Some Constraints
HBM	HBM3E	Rising	52+	Some Constraints

Source: EET China, TrendForce, AnandTech, Industry Spot Prices

4.1.1 In August, memory chip prices across the board increased, with structural adjustments on the supply side

1) Product Trends

DDR4: Due to major DRAM manufacturers planning to phase out DDR4 in favor of DDR5, market expectations are for reduced supply, leading to a 15-20% month-on-month increase in spot prices. The cumulative price increase for the year has already surpassed 50%.

DDR5: Prices are also rising, but at a more moderate pace, with an increase of 5%. The demand from AI PCs and servers continues to grow steadily.

NAND Flash: Prices have stabilized after fluctuations and are expected to remain at average levels for the year. In Q2 2025, NAND Flash prices are anticipated to increase by 0-5% compared to Q1.

eMMC: Due to changes in the supply strategies of some original manufacturers, which have released some MLC NAND resources to downstream storage manufacturers, prices for certain lower-capacity eMMC products have risen significantly. For example, 8GB, 16GB, and 32GB eMMC prices may surpass the prices of 64GB eMMC.

HBM: SK hynix plans to increase the price of HBM4. In the first half of this year, the price for the 12-layer stacked HBM4 supplied to Nvidia was about $500, which is 60%-70% higher than the same specification HBM3E (around $300).

2) Market Trends

Strong Growth Potential: The storage chip industry is undergoing a critical transition and entering a recovery cycle. Strong demand from AI, high-performance computing, and data centers is driving improvements in the industry's market outlook. With continued demand from AI, cloud computing, and other sectors, the storage chip market is expected to expand.

Industry Restructuring: DRAM capacity is shifting to HBM/DDR5, with traditional DDR4 and small-capacity NAND becoming key areas of shortage. The industry's concentration may increase further, with companies possessing core technological reserves and global supply capabilities gaining an advantage. Major international players like Samsung, SK hynix, and Micron are shifting their focus toward high-end product lines like HBM, reducing their supply of DDR4 and mobile LPDDR4X products.

4.2 GPU

GPU Market Key Movements (Aug 2025)

Product	Model	Manufacturer	Price Trend	Lead Time (Weeks)	Supply-Demand Status
Consumer	RTX 5090	NVIDIA	Falling	4-6	Easing
Consumer	RX 9070 XT	AMD	Rising	4-8	Balanced
Consumer	Ada Loveless Series	NVIDIA	Rising	Not specified	EOL expected (H2 2026)
Data Center	H100/H200	NVIDIA	Rising	20+	Short Supply
Data Center	MI300X	AMD	Falling	12-16	Easing
Data Center	Blackwell 200/4000/5000 Series	NVIDIA	Rising	Expected delivery in Sep/late	Short Supply
Cache memory components	GDDR6 Memory	-	Rising	6-8	Easing

Sources: Jon Peddie Research, DigiTimes, supply-chain channel surveys

4.2.1 Product Iteration Accelerates, AI GPU Leasing and Substitution Trends Are Significant

1) Product Updates

Consumer: NVIDIA's RTX 5090 graphics card price continued to decrease in August, with lead times around 4-6 weeks, easing the supply-demand imbalance. In contrast, AMD's RX 9070 XT saw price increases due to stronger market demand, with lead times between 4-8 weeks, maintaining a balanced supply-demand situation. Additionally, NVIDIA announced that the Ada Lovelace series will enter its EOL (End-of-Life) phase in the second half of 2026, signaling an accelerated product iteration cycle for the next-generation products.

Data Center: Prices for NVIDIA's H100/H200 GPUs continue to rise, with H200 supply still tight and lead times exceeding 20 weeks. AMD's MI300X has seen price reductions, with delivery cycles between 12-16 weeks, and market supply has generally eased compared to previous periods. The delivery of NVIDIA's Blackwell series (200/4000/5000) chips is expected to be delayed until September or later, reflecting continued strong demand for high-performance GPUs in AI and large model computing markets.

Storage Components: Supply of GDDR6 memory remains tight, with lead times staying at 6-8 weeks. Ongoing demand for high-performance graphics cards and AI accelerator cards has further pushed up delivery cycles for these components.

2) Market Trends

Product Lifecycle Adjustments: NVIDIA is accelerating product iteration, with plans to gradually phase out the Ada Lovelace architecture in the second half of 2026 and accelerate the penetration of the Blackwell architecture, especially in cloud computing and AI inference applications.

Acceleration of Substitution with Chinese Alternatives: The discontinuation of NVIDIA's H20 has accelerated the self-development efforts of Chinese companies in the AI chip sector. At the 2025 China Computing Power Conference, the industry predicts that the Chinese GPU market will surpass 100 billion yuan in 2025, with data centers and edge computing contributing significantly to the growth.

4.3 CPU

GPU Market Key Movements (Aug 2025)

Product	Model	Manufacturer	Price Trend	Core / Threads	Lead Time (Weeks)
Consumer	i5-13400F	Intel	Rising	10-16	3-7
Consumer	R9 9950X3D	AMD	Falling	16-32	7-10
Consumer	13th Gen Mobile CPU	Intel	Falling	Not specified	Not specified
Consumer	Ryzen 8000G	AMD	Falling	With NPU	Not specified
Server	Xeon 6980P	Intel	Falling	128	Not specified
Server	EPYC 9845	AMD	Falling	160	Not specified
Server	Emerald Rapids Series	AMD	Stable	Multi-core	Not specified
Server	EPYC Turin / Genoa (9005 Series)	AMD	Falling	High-core (64–192 cores)	Not specified

Source：Data compiled from publicly accessible online data

4.3.1 Server CPU Pressures Rise, Starting Price Wars; Consumer Market Shows Supply and Demand Divergence

1) Product Updates

Consumer: Intel Core i5-13400F prices saw a slight increase, with lead times remaining at 3-7 weeks. In contrast, AMD's R9 9950X3D has experienced a small price reduction, with lead times around 7-10 weeks, reflecting differing strategies from both companies in the mid- to high-end desktop market. Intel's 13th-generation mobile processors (Raptor Lake) are gradually improving in supply, easing some of the high-frequency demand. Meanwhile, AMD's Ryzen 8000G series, with integrated NPU and tight supply, continues to face demand exceeding supply.

Server: Intel Xeon 6980 (Granite Rapids) and AMD EPYC 9845 both experienced noticeable price reductions, but lead times remain stable, indicating that both companies are adjusting inventory as they prepare for next-generation products. Deliveries for Emerald Rapids and Sapphire Rapids series remain tight, with strong demand for next-generation server CPUs in data centers. AMD's EPYC Turin and Genoa (9005 series) products continue to see rising demand, extending lead times and increasing the urgency for enterprise purchases.

2) Market Trends

Escalating Price Wars and Accelerating Technological Iteration: To respond to market competition, Intel and AMD's high-end server CPUs are currently experiencing price cuts of up to 50%. For example, Xeon 6980P and EPYC 9965 have seen significant discounts, prompting companies to upgrade ahead of schedule. Furthermore, Intel has confirmed the upcoming launch of new Xeon 6 series products, such as Diamond Rapids (P-Core) and Clearwater Forest (E-Core), in 2026, which will enhance energy efficiency and AI acceleration capabilities. Meanwhile, AMD continues to solidify its leadership in high-core, high-performance server markets with its powerful EPYC Turin / Genoa architecture.

Clear Trend of AI and Edge Network Integration: Intel's Xeon 6 SoC can increase RAN capacity by 2.4 times and improve performance-to-power ratio by 70% in AI and 5G network core scenarios. NPU integration has become a standard feature in CPUs.

Supply Uncertainty to Persist Through Year-End: The pressure from the semiconductor supply chain is expected to continue, with CPU shortages likely lasting through the end of 2025. Enterprises will need to plan ahead to mitigate supply delays.

References

[1]Advisor Perspectives. "S&P Global US Manufacturing PMI™: First Contraction of 2025," Advisor Perspectives, August 1, 2025.

[2]Evertiq. "Global Semiconductor Sales Increase 7.8% from Q1 to Q2," Evertiq, August 14, 2025.

[3]Federal Reserve Bank of St. Louis. "Market Yield on U.S. Treasury Securities at 10-Year Constant Maturity, Quoted on an Investment Basis," Federal Reserve Bank of St. Louis, August 20, 2025.

[4]PR Newswire. "July 2025 Manufacturing ISM® Report On Business," PR Newswire, July 1, 2025.

[5]S&P Global. "Monthly PMI Bulletin: July 2025," S&P Global, July 1, 2025.

[6]Semiconductor Industry Association (SIA). "Global Semiconductor Sales Increase 7.8% from Q1 to Q2," Semiconductor Industry Association (SIA), June 5, 2025.

[7]Trading Economics. "United States Manufacturing PMI," Trading Economics, July 1, 2025.

[8]U.S. Department of the Treasury. "Daily Treasury Par Yield Curve Rates," U.S. Department of the Treasury, August 20, 2025.

[9]Trump, Donald. "U.S. to Impose High Tariffs on Imported Semiconductors, Rates Could Reach 300%," Reuters, 2025.

[10]Lutnick, Howard. "U.S. Government Considers Equity-for-Subsidies Plan for Semiconductor Giants," Wall Street Journal, 2025.

[11]NVIDIA. "Jetson AGX Thor Platform Released for Robotics and Physical AI Applications," NVIDIA Official Press Release, 2025.

[12]深圳市工业和信息化局. "深圳市发布高端装备产业发展扶持计划，重点支持半导体设备领域"，深圳经济日报，2025。

[13]江苏省人民政府. "江苏省发布2025年首批次新材料认定结果，其中涉及半导体材料"，江苏新闻，2025。

[14]深圳市工业和信息化局. "深圳市高端装备产业发展扶持计划操作规程，半导体设备获资助"，深圳市政府官网，2025。

[15]美光科技. "宣布裁员并削减成本，以聚焦HBM与高毛利内存," 美光科技官方新闻稿, 2025年。

[16]新浪财经. "寒武纪、海光信息等国产芯片概念股高开," 新浪财经, 2025年。

[17]财经网. "三星电子：HBM4通过验证，技术追赶获关键进展," 财经网, 2025年。

[18]证券时报网. "SK海力士：HBM3E需求强劲，业绩创历史新高," 证券时报网, 2025年。

[19]美光. "美光：裁员并削减成本，聚焦HBM与高毛利内存," 美光官网, 2025年。

[20]Renesas. "Renesas发布RZ/G3E MPU与RA8P1 MCU，面向工业/人机界面与高性能控制," Renesas官网, 2025年。

[21]DeepSeek. "DeepSeek：发布V3.1模型支持FP8，推动国产AI芯片生态," DeepSeek官方博客, 2025年。

References

[22]STMicroelectronics. "意法半导体：发布Q2业绩并宣布收购NXP传感器," STMicroelectronics官网, 2025年。

[23]NXP. "恩智浦（NXP）Q2 EPS略超预期，并出售MEMS传感器业务强化战略聚焦," NXP官网, 2025年。

[24]华为. "华为：麒麟芯片实现全产业链国产化," 华为官网, 2025年。

[25]台积电. "台积电：逐步退出6英寸产线，资源聚焦先进制程与封装," 台积电官网, 2025年。

[26]NVIDIA. "英伟达：Blackwell→Rubin架构演进与中国市场合规策略," NVIDIA官网, 2025年。

[27]软银集团拟20亿美元入股英特尔 或成后者第五大股东证券时报网，2025年。

[28]寒武纪的4000亿之问，价值新章还是泡沫狂欢？，新浪财经，2025年。

[29]谷歌将在美再投资90亿美元 用以扩建云计算和AI基础设施，财联社，2025年。

[30]阳光电源拟在阿曼建氢能电解槽工厂，新浪财经，2025年。

[31]长安汽车拟在欧洲建厂，布局海外市场，太平洋汽车，2025年。

[32]小米营收连续3个季度超千亿元 汽车业务预计下半年盈利，证券时报，2025年。

[33]这家上市公司，在芜湖布局超级工厂暨全球总部！澎湃新闻，2025年。

[34]密集对外投资、规模化商业签单！智元机器人的商业化新突破，财联社，2025年。

[35]7000亿AI龙头，上半年业绩创新高，中国证券报，2025年。

[36]豪恩汽电增长乏力净利率三连降 拟募11亿扩产押注10倍增长空间

[37]迈瑞医疗全球第二总部在汉开园，300%增资“追投”武汉，武汉市人民政府

[38]迈瑞医疗武汉基地开园 总投资额45亿元，金融界

[39]2025年中国存储芯片市场分析及重点企业表现——数据透视行业动态与趋势

[40]存储芯片迎来复苏周期，NAND和DRAM价格企稳回升，金融界

[41]2025年GPU统计数据及发展趋势：半导体设备国产替代加速

[42]2025年8月显卡市场观察：性能激增与选择困境

[43]TI发布涨价通知！超6万料号集体提价10%-30%

[44]AMD与Intel服务器CPU价格激战，部分型号直降50%

Disclaimer

The monthly report issued by Briocean (hereinafter referred to as "Briocean") is compiled by Briocean's Marketing and Branding department based on publicly available data, information, and research reports.

The content of this report, such as information, opinions, and speculations, solely represents the judgments and perspective of Briocean at the time of the report's issuance. The content is intended for reference purposes only, and does not constitute bids, solicitations, offers or invitations to make offers for the mentioned products. It neither forms the basis of any contractual obligation nor recommendation for the buying or selling of any investment instruments or execution of any transactions. Furthermore, it does not provide investment or procurement advice or guidance. Briocean bears no legal responsibility for any direct or indirect consequences or losses arising from the use of the information and content. Readers are urged to exercise caution, independent judgment, and analysis when reviewing this report.

Briocean does not guarantee the authenticity, accuracy, completeness, or timeliness of the data referenced in this report, research report or information obtained from third-party sources. Published information, opinions, and data may become inaccurate or obsolete due to changing circumstances or other factors after the publication date. However, Briocean is not obligated to update inaccurate or outdated information, opinions, and data, nor will it notify readers of such changes or updates.

August 2025
Briocean

YOUR PREFERRED SUPPLIER FOR GLOBAL SOURCING

Briocean was established in 2008 as ISO14001, IS09001:2015, AS9120B and ANSI/ESDS20.20-2021 certified leading independent electronic component distributor, with our headquarters in Singapore. Our company specialises in insourcing and supply chain management servic es for the elec tronics manufacturing clients across a broad range of industries.

Our global network of over 10,000 vetted suppliers allows us to respond to the unique needs of our clients, from reducing component shortages to achieving significant cost savings. Our robust supplier management system and two state-of-the-art quality assurance centres in Shenzhen and Hong Kong ensure that we deliver reliable, traceable procurement services.

At Briocean, quality is our cornerstone. Our commitment is to ensure that every component we source is of the highest quality.